

Intake Training

- 1) Be SO welcoming in the waiting room. Smile, shake hands, call them by name.
- 2) Lead them into your office. They don't know where to go
- 3) Thank them for filling out the paperwork
 - a. Ask if they had any questions
 - b. Highlight: Confidentiality limits, Information about contacting you, Late Cancellation/No Show fee
 - c. Scan the Client Information form: esp. spirituality & symptoms
- 4) If they haven't filled out paperwork on line, give them a packet to fill out. Wait for them to fill it out. Proceed to #3.
- 5) *How would you like to take care of payment?* Most people will use the CC on file.
- 6) Give them an idea of how the session will proceed.

I'll be asking a lot of questions to get a sense of what is going on for you. Some of the questions will seem random, but I want to cover all the bases. Because we have a lot to cover, I may guide our conversation and have to cut you off. However, we'll get to all of your concerns over the next few sessions. Our sessions are 45 minutes, so we'll stop at ____:45 to schedule our next session. In the next session or two, we'll also be working on a treatment plan to make sure we're working on what you want to work on and to make sure we're making progress! It's important to know that much of the progress that happens during the course of counseling is in-between counseling sessions. So, I'll probably be giving you homework to do between sessions. (FOR INTERNS/LPCCs) Also, I'll need to video a few sessions throughout this next four months for my training. I'd like you to consider being one of the clients that I video.
- 7) Begin to fill out the intake form – but be as personable as possible!
- 8) Try to offer the client a skill based on what's needed so they can “take something with them.”
 - a. If anxiety – breathing exercise
 - b. If depression – gratitude journal
 - c. If sleep difficulties – a sleep hygiene skill
 - d. If marital conflict – time out ground rule
- 9) Before ending, summarize what you've covered. Give a general plan for the next session.
- 10) Give yourself a lot of grace as you practice this skill. You will frequently not finish the full intake in the first session. Roll with it.